

Ormiston Academies Trust

Ormiston Shelfield Community Academy
Management of off-site visits and related activities policy

Policy version control

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Author	Louisa Sharpless, Head of Safety and Estates Compliance and James Miller, National Director of Estates and Technology
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Policy Digest

Academies must follow the flow diagram and document check list in the appendix. Academy emergency contacts during the trip, must be contactable at all times. Every school trip must be signed off by the principal (not delegated), where the trip is high risk (e.g. international/residential, impact sport) OAT head office and the academy Education Director must also agree the trip in addition to the principal – in advance of the visit taking place. All trip leaders must complete OAT delivered training.

For further information and guidance please visit [Offsite Visits - Evolve \(sharepoint.com\)](#)

1. Introduction

- 1.1. Experiences gained by children through off-site educational opportunities should not be seen as isolated opportunities but as a vital part of the progression of a child's education. That they have a profound effect on children is an indication of their relevance within a broad and balanced curriculum.

The experience provided can support children's education:

- Personal and social education. These skills are developed through such activities as problem solving, decision-making and teamwork. Working and playing together, particularly in a residential situation, afford plenty of opportunities for development in these areas.
- Residential experiences. These provide an opportunity for development of social skills through living and working together.
- Environmental awareness. The cross-curricular theme of environmental education is catered for specifically when pursuing off-site activities. A rich variety of environments, both natural and manmade can be experienced by students of all ages.
- Aesthetic and creative development. Project and topic work related to the vast range of activities available, give rise to a multiplicity of opportunities related to creative and aesthetic interpretation.

- 1.2. The range of activities covered by this policy includes:

- 1.2.1. **Category visit A** | These visits are close to the school, done on a regular basis involving environments known to the staff. It would include normal daily life activities. Examples include walks and exploring the area near the school site, visits to the local church, library, school sporting fixtures and other regular non-complex activities. It can also include transport if needed.
- 1.2.2. **Category visit B** | These visits are to areas beyond the local area involving more complex environments and activities and will be a one-off or irregular activity in the school year. The leaders will be approved to lead the visit by the EVC. There may be some specialist training attached to some activities in this

area. Examples include visits further afield, farm visits, local parks, museum visits, swimming lessons in offsite pools, zoo visits, sporting festivals and larger tournaments and some basic outdoor education activities.

- 1.2.3. **Category visit C** | visits include residential visits and overseas visits, adventure activities and activities involving water. The OAT Outdoor Education Adviser Panel (OEAP) trained adviser must scrutinise and approve all category C visits. If you are unsure whether your visit is category C, please contact OAT head office. Louisa.Shapless@ormistonacademies.co.uk (**Head of Safety & Estates Compliance**) or Mike.Tibbits@ormistonacademies.co.uk (Outdoor Education Adviser)
- 1.3. It is not possible to provide a completely definitive activities list. Examples of activities included would include Duke of Edinburgh expeditions, outdoor adventure activities including hills and mountains, adventures on water or field studies involving water and motorsports. For current legislation related to adventurous activities, visit the HSE Adventure Activities Licensing Service website.

2. The legal framework

- 2.1. The health and safety at work requirements must be taken into consideration whenever an activity is being planned. Many activities will fall within the “normal” school day and will therefore be included in “directed” time. However, where an activity falls partly or solely outside the school day, there are implications for employment.
- 2.2. Staff cannot be required to undertake activities out of their normal working time. It is therefore crucial to ensure that staff have volunteered their services for out of school hours’ activities and that full indemnity is available for all those taking part in such activities. Under the Health and Safety at Work, etc., Act 1974: employers are responsible for the health, safety, and welfare at work of their employees.
- 2.3. Employers are also under a duty of care to ensure, so far as is reasonably practicable, the health and safety of anyone else on the premises or anyone who may be affected by their activities. This duty of care extends to the students in school and includes participants in off-site visits.
- 2.4. The Management of Health and Safety at Work Regulations 1992 requires the employer to assess the risks of activities, to introduce measures to control those risks and to tell employees about the measures taken.
- 2.5. Responsibility also falls to the employee to take reasonable care of their own and others’ health and safety: to co-operate with their employer over safety matters: to carry out activities in accordance with the instructions and training they have received and to inform the employer of any serious risks they encounter.
- 2.6. Teachers also have a common law duty to act “in loco parentis” (as a reasonable parent), as indeed would any other employee involved in an off-site activity.
- 2.7. All staff or volunteers carrying out educational visits and activities must comply with OAT policies in particular those relating to Safeguarding and Child Protection, Allegations of Abuse Against Staff and Low-Level Concerns, OAT Staff Code of Conduct.

- 2.8. All educational visits and activities booking and purchasing must comply with the OAT Procurement Policy, OAT Expenses policy and use of procurement card for purchasing goods and services.

3. Scope and remit

- 3.1. All OAT academies are required to adhere to this policy for the management of all off-site visits and related activities.
- 3.2. The Evolve visits online system has a useful resources section with guidance to help prepare and deliver successful visits and trips.
- 3.3. This policy applies to Ormiston Academies Trust employees, contractors and volunteers whose work involves any one of the following, regardless of whether the activities take place within or outside of normal working hours, including weekends and holiday periods:
 - 3.3.1. direct supervision of children undertaking experiences beyond the boundary of their normal operational base.
 - 3.3.2. facilitating experiences for children undertaking experiences beyond the boundary of their normal operational base.
 - 3.3.3. deploying staff who will supervise or facilitate experiences of, or for, children undertaking experiences beyond the boundary of their normal operational base.
- 3.4. This policy and associated guidance does not cover the following:
 - 3.4.1. Where establishments operate on a split site, the movement of staff and children between sites;
 - 3.4.2. Work experience as defined in the publication "Work Experience: a guide for secondary schools"
 - 3.4.3. Physical Education activities, led by OAT employees, that do not fall within the scope of Adventurous Activities, as defined by <https://oeapng.info/> in their guidance document 7.1a-Adventure-activities.pdf. The activity supervision should be that required or recommended by specialist PE guidance, such as that provided by the [Association for Physical Education](#) (AfPE). The journey to and from the venue and any adventurous activities and activities provided by third parties are covered by this policy and associated guidance.
- 3.5. The following terms are used in this policy:
 - 3.5.1. Off-site visits and activities will include; educational visits, learning outside the classroom (LOtC) and outdoor learning activities that take place beyond the boundaries of the establishment site (i.e. school).
 - 3.5.2. An Educational Visits Co-Ordinator (EVC) is an appropriately competent OAT employee appointed to ensure that all off-site activities meet the requirements of their employer's policy and guidance, as well as the requirements of establishment policy and procedures.

- 3.5.3. A Leader is any adult with supervisory responsibilities for children on an off-site visit.
- 3.5.4. A Visit Leader is a responsible person (employed, contracted or a volunteer), engaged through a thorough the trip duration, with overall responsibility for an off-site visit;
- 3.5.5. The Visit Head is the academy principal who has overall accountability for all visits and trips.
- 3.5.6. Establishment refers to an academy that is part of Ormiston Academies Trust (OAT).

4. Advice and support

- 4.1. As the employer, Ormiston Academies Trust will provide:
 - 4.1.1. Appropriate guidance. The resources section in Evolve has lots of useful information and guidance about off-site visits and activities. Employees must be familiar with this policy, forms, and checklists and how to access OEAP National Guidance
 - 4.1.2. Access to training upon request to ensure that those trained are kept up to date.
- 4.2. For the purposes of day-to-day updating of information, EVCs and Visit/Activity Leaders are directed to the posting of EVC Update, an occasional newsletter, in the EVOLVE Resources area.
- 4.3. Access to advice and expertise from appointed staff who have experience in managing offsite visits and the management and mitigation of risk.
- 4.4. Where an employee experiences problems finding specific material, or requires clarification or further help and guidance, they must contact their establishment's Educational Visits Coordinator (EVC), in the first instance.
- 4.5. If the EVC is unable to resolve a problem, they should contact:
Louisa.Sharpless@ormistonacademies.co.uk (Head of Safety & Estates Compliance) or
Mike.Tibbits@ormistonacademies.co.uk (Outdoor Education Adviser)

5. Ormiston EVOLVE <http://oatvisits.org.uk>

- 5.1. EVOLVE is a web-based system that provides the following:
 - An online Notification and Approval system for visits.
 - OAT Policy & Guidance for Off-site Visits and Related Activities.
 - OAT forms and documents, referenced in the Employer Guidance and essential for the visit process.
 - Forms and documents, essential for the visit process.
 - Best-practice forms and documents that may be adapted by establishments to support the visit process.
 - Links to important national documents.
 - Search and Reporting facilities.

- 5.2. All staff involved in the visit process will be given an appropriate personal EVOLVE account to enable them to access key policies; employer and national guidance; good-practice forms and documents; the notification and approval process for visits.

6. Role-specific requirements

- 6.1. Each establishment is required to have an Educational Visits Co-ordinator (EVC) in place who, through experience and training, is appropriately competent to fulfil that role in their establishment.
 - 6.1.1. The EVC may receive administrative support but remains responsible for scrutinising visit approval requests and either the subsequent submission of visit approval forms to the principal or return of the visit form to the Visit Leader.
- 6.2. The principal is responsible for ensuring that visits are authorised in accordance with OAT's requirements in the Appendix 2. The principal must not delegate authorisation of any school trip.
 - 6.2.1. An EVC who has previously scrutinised a visit and submitted it for authorisation, should not also authorise that visit under delegation by the principal.
- 6.3. Every off-site visit must have a designated Visit Leader:
 - 6.3.1. The Visit Leader must be a Leader who is accompanying the visit.
 - 6.3.2. Where a visit is to be unaccompanied, a Visit Leader must be designated and identified on the visit form with a note clearly stating the visit is to be unaccompanied.
 - 6.3.3. Joint Visit Leaders are not permitted, though, Deputy Visit Leader(s) may be appointed as required.
- 6.4. Stakeholder roles and responsibilities should reflect those detailed in OEAP National Guidance: Section 3.1b Requirements and Recommendations for Establishments.
- 6.5. Establishments are required to ensure that all Visit Leaders and Leaders have been assessed as competent and confident to undertake responsibilities they have been assigned in line with OEAP National Guidance: Section 3.2d Assessment of Competence.

See also *OEAP National Guidance: Section 3.4: Roles & Responsibilities*

7. Notification and approval of off-site visits and related activities

- 7.1. The OAT procedure for the notification and approval of off-site visits and related activities in Appendix 2 must be followed.
- 7.2. All trips, visits and related activities must be recorded in the Evolve system.

- 7.3. Category A and B visits and related activities must be signed off and agreed by the principal before the trip is commenced. (recorded in the Evolve System)
- 7.4. Category C visits and related activities: Establishments are required to notify and seek OAT Head Office and Education Director approval before the visit or activity takes place.
- 7.5. OAT Head Office and Education Directors (ED) will require at least 15 working days' notice to review and process documented information. *(Evolve does not currently have facility to track ED signoff - email of support uploaded to Evolve is sufficient to record ED agreement)*
- 7.6. For overseas visits and those involving complex arrangements, staff must be prepared to discuss such visits with OAT well in advance, possibly 12 months before the departure date.
- 7.7. Trip costs must be agreed with the regional finance business partner in advance of setting up the trip. The level of scrutiny/review is dependent upon the cost and complexity of the visit. For a simple local and low-cost trip this may involve a quick review, however for an overseas visit involving many different transport and accommodation suppliers the review may need to be more in-depth. This is to be decided and agreed by the regional finance business partner. *(Evolve does not currently have facility to track regional finance business partner signoff - email of support uploaded to Evolve is sufficient to record ED agreement)*
- 7.8. Academy Finance Team must follow the OAT Procurement Policy and ensure that required businesses cases are completed and approved in advance of the visit.

8. Monitoring

- 8.1. Academy principals are responsible for monitoring the implementation of this policy and associated guidance within their establishment.
- 8.2. Monitoring should be carried out through systems put in place by the establishment Principal and EVC in accordance with OEAP National Guidance: Section 3.2b Monitoring. This will include monitoring, on a sample basis, visits in progress (sometimes referred to as field monitoring).
 - 8.2.1. OAT Head Office Health and Safety Team and OAT Outdoor Education Adviser will monitor selected visits and activities from time to time to ensure Health and safety compliance.
 - 8.2.2. OAT Head Office 'Head of Compliance and Reporting' with support from Regional Finance Team will monitor selected visits and activities from time to time to ensure Finance compliance.
 - 8.2.3. OAT Head Office 'School Improvement Team' will from time to time collate type and frequency of educational visits to inform discussion about equity and variety of visits and experiences for children.
 - 8.2.4. OAT Head Office will review this policy and process annually.

See also OEAP National Guidance: [Section 3.2b Monitoring](#)

9. Risk management

- 9.1. Risks are expected to be reduced to an acceptable or tolerable level, but not necessarily eliminated. Planning should achieve a rational balance between potential adverse risks and the intended benefits and outcomes of the activity.
- 9.2. Risk management tasks are delegated to academies and should be carried out by the Visit Leader (and Leaders) with the support of EVCs and other colleagues as required.
- 9.3. A 'detailed visits plan' and risk assessment must be produced detailing how any risks will be managed to include any individual safeguarding, SEND or medical requirements whilst arranging trip. All control measures, information and emergency provision must be recorded and accessible to all staff involved with the visit.
- 9.4. To minimise the risk of any additional 'over the counter' medication being required during the visit please ensure consent and up-to-date medical information (including details of all allergies and regular medication) is gathered for each child prior to the visit. Ensure that parents are notified about what home remedies will be carried by visit leaders and what the process for issuing these will be, in line with the 'Supporting Children with Medical Needs' policy.
- 9.5. Academies (with support from head office) should arrange training for staff in risk management, for all staff who are co-ordinating leading and supporting the trip as required.

See also OEAP National Guidance: [Section 4.3c Risk Management](#)

10. Training

- 10.1. OAT recognises, requires, and recommends, as appropriate, the following basic training courses for visit stakeholders:
 - 10.1.1. Educational Visits Co-ordinator (EVC) Training:
 - All academy staff with EVC accounts on EVOLVE must have completed an OAT EVC Training course delivered by OAT.
 - EVC Training courses are recommended for academy staff who hold, EVC Administrative Support (AS) accounts to enable them to support the EVC and Head accounts as they are responsible for authorising visits from their academies.
 - 10.1.2. EVC on-going professional development:
 - EVCs will also be kept up to date on termly basis through on-line meetings carried out by OAT Off-site Visits Adviser and additional information as required via email and updated newsletters. OAT requires EVCs to be familiar with and share information, when necessary, and implement actions in these communications.

- OAT may provide additional continuing professional development opportunities for EVC and (Evolve System) Head account holders that will provide training to raise awareness and competence to supplement previously completed EVC training.

10.1.3. Leader Training:

- Leaders are required to be appropriately competent to fulfil their responsibilities. This will require them to be current in their knowledge of good practice and be able to apply it when planning and leading visits.
- Leaders and particularly Visit Leaders must have completed Leader Training which will be delivered by OAT or an OAT approved provider, this will include OEAP and OAT core messages for those leading off-site visits and activities.

10.2. The following training courses are also recognised for Visit Leaders in certain visit contexts:

- Off-Site Safety Management, OSSM (Royal Geographical Society, RGS) - training for expedition leaders leading educational visits in remote or hostile terrain.
- Snow sports Course Organiser award, SCO (Snow sport England) training for staff organising and/or leading snow sports educational visits.
- Lowland Expedition Leader Award (Leadership Skills Foundation), Lowland Leader Award with Camping Leader Award (Mountain Training UK), Hill and Moorland Leader Award with Camping Leader Award (Mountain Training UK) or Mountain Leader Award (Mountain Training UK) – for staff organising and/or leading off-site Duke of Edinburgh’s Award expedition activities completed on foot.

10.2.1. Identification of training needs and provision of appropriate training courses is delegated to Academies with support from OAT head office.

10.2.2. Further advice and information relating to training for off-site visit stakeholders may be obtained from the OAT Off-site Visits Adviser.

11. Insurance

11.1. Academies purchasing insurance through the OAT Service Agreement are automatically insured for Personal Accident and Travel insurance.

11.2. Employer’s and public liability policies are in place in the event of personal injury claim being brought against the establishment.

11.3. Academies should be aware of the limitations and exclusions. In broad terms the cover will provide indemnity for all trips apart from the following:

- Aerial pursuits
- Caving (using caving equipment)
- Diving (using external breathing apparatus)

- Hiking, trekking, or mountaineering (>3000m)
 - Motor cycling
 - Mountaineering or rock climbing (using ropes or guides)
 - Racing of any kind (other than on foot)
 - Higher risk water pursuits such as jet skiing or white-water rafting
 - Any winter sports activity defined as Winter Sports
- 11.4. It is expected that activity providers will have specialist insurance to cover above activities. If you are planning on these activities, you must confirm cover is in place by the activity provider and record the insurance details in Evolve.
- 11.5. Any related additional insurance costs must be agreed with your Academy Regional Finance Partner.

See also OEAP National Guidance: Section 4.4c Insurance

12. Management of incidents, emergencies, and critical incidents

- 12.1. In the event of an emergency or incident trip leaders must contact their home visit contact and if required PLMR who will provide any additional support – for more information please follow guidance on OATnet [Major incident and crisis](#)
- 12.2. All staff who have the responsibility as a home contact for individual visits must have 24-hour contact capability during the duration of the visit in the case of an emergency. It is their responsibility to support the visit leaders and communicate with both parents/carers (as appropriate) and senior leaders.
- 12.3. Trip leaders must ensure any incidents are reported via iAM Compliant system under report an incident.
- 12.4. Safeguarding concerns must be recorded on CPOMS

Appendix 1 – Academy level example process

The below is not intended to be an exhaustive check list. It is intended to provide an overview of common questions /answers for the Academy EVC and principal/SLT to discuss when considering a pupil offsite trip/activity.

Stage 1 – Visit proposal / activity pre-visit

To undertake a full and comprehensive assessment of risks, it will be essential in most cases to undertake a pre-visit.

Even where the visit is made regularly, risks should be reassessed from time to time. When undertaking risk assessment, several variables need to be considered:

- Trip Lead (person leading the trip – maybe different from EVC)
- Educational purpose of the activity/trip – how will it benefit the children?
- Trip; Detail; Date – Visa’s required?
- children requiring specific medical needs - protocol established between the school, the parents and the medical practitioner depending upon the differing circumstances of the activity.
- the number of children involved.
- the age of the children, their gender, ability, and general behaviour.
- medical, communication, SEND, vulnerabilities. Advice and guidance must be sought from both the DSL and the SENCO
- the previous experience of the group in undertaking off-site visits.
- the time of the day and the time of year.
- the travel arrangements.
- the hazards of the environment being visited.
- the numbers, experience and quality of accompanying staff and volunteers.
- the nature of the activity.
- Trip destination licensing/insurance to carry out activity with groups of children.
- Visits organised by 3rd parties - licensing/insurance/regulatory registration
- trip destination
- Cost (funded / cost to be met by pupil?)
- How many children (Year Group/Targeted?)
- Transport Information (Academy Minibuses/ Coach – is cost covered?)
- Staff Attending (Safeguarding - staff ratio to child; male/female needed?) (any classroom cover needed?)
- Insurance (Does our current policy cover this? If not contact Zurich for advice)

Prepare a risk assessment using above information and the example Risk Assessment template in Appendix 3.

Stage 2 - Principal and SLT activity

Once the above information is received, this should be taken to SLT for approval.

SLT will discuss the following:

- Educational benefit
- Is the date free on the academy calendar? Are there any foreseeable issues with this date?
- risk assessment – care for children appropriate
- Discuss details of the trip (Can we afford the required staff? Look at cover, staff who can drive the minibus etc.), (Look at costs – Are these realistic? Do they cover all costs like transport/diesel?)
- Pupil Numbers (Do we reduce numbers to fit minibuses- more cost effective? Is this a year group that we would want to take? Pupil number: staffing etc.)
- Any other points to discuss.
- SLT will then - Need further info/stipulate conditions (i.e. max number); Decline proposal; Accept proposal.

SLT will then either - Need further info/stipulate conditions (i.e. max number); Decline proposal; Accept proposal.

Stage 3 - Trip approval accepted

If the trip is approved:

- The Trip Lead with support from EVC will complete the Evolve system online form
- Document risks assessment in the Evolve System
- The flow diagram will be followed in Appendix 2 ensuring that signatories are recorded (attached email of support or formal signing in the Evolve system) in Evolve depending upon the category of the trip / activity.
- The academy principal will sign off in the Evolve system trip to record their agreement to the trip being carried out. (All trips to be checked by EVC, signed off by the Principal and Category C (High Risk, Residential, International) must be approved by Head Office)
- The trip be recorded on the academy calendar.
- The Trip Lead / EVC will draft trip letter (letter draft approval sought from SLT). If there are any costs attached this will be included within the letter with any instalment information.
- The Academy Finance Team will keep payment information up to date and pay suppliers.
- The Trip Lead / EVC will complete all necessary requirements on Evolve system and seek Hed Office approval if required.
- Letters and trip to be uploaded to ClassCharts and/or iPay
- Any transport and tickets can then be booked – by finance / minibus bookings
- Responses – consent, payments, medical. Photo and dietary requirements (if applicable) and any changes to emergency contacts
- Order FSM packed lunches (if applicable) by xx date
- Once student list is finalised – Red flags to be put on SIMS – Attendance

Stage 4 – Day of visit

On the day of the trip/activity:

- Collect any forms/medication.
- Emergency contact details – risk assessment – pupil care/medical information
- Collect FSM packed lunches.
- Register children and inform the attendance team of attendees
- Ensure (if a residential, overseas) your home (Academy) contact has all the relevant information.
- First-aid in all cases a first-aid box is to be readily available during the course of an off-site activity. (The provision of first aid must be considered fully in the activity risk-assessment.)
- Make sure all students have the correct kit, bags etc. before you depart

Throughout the visit, an ongoing assessment of risk should take place and unexpected or unplanned events or changes to circumstances should be considered using the principles outlined in this policy.

Stage 5 - During Trip and feedback

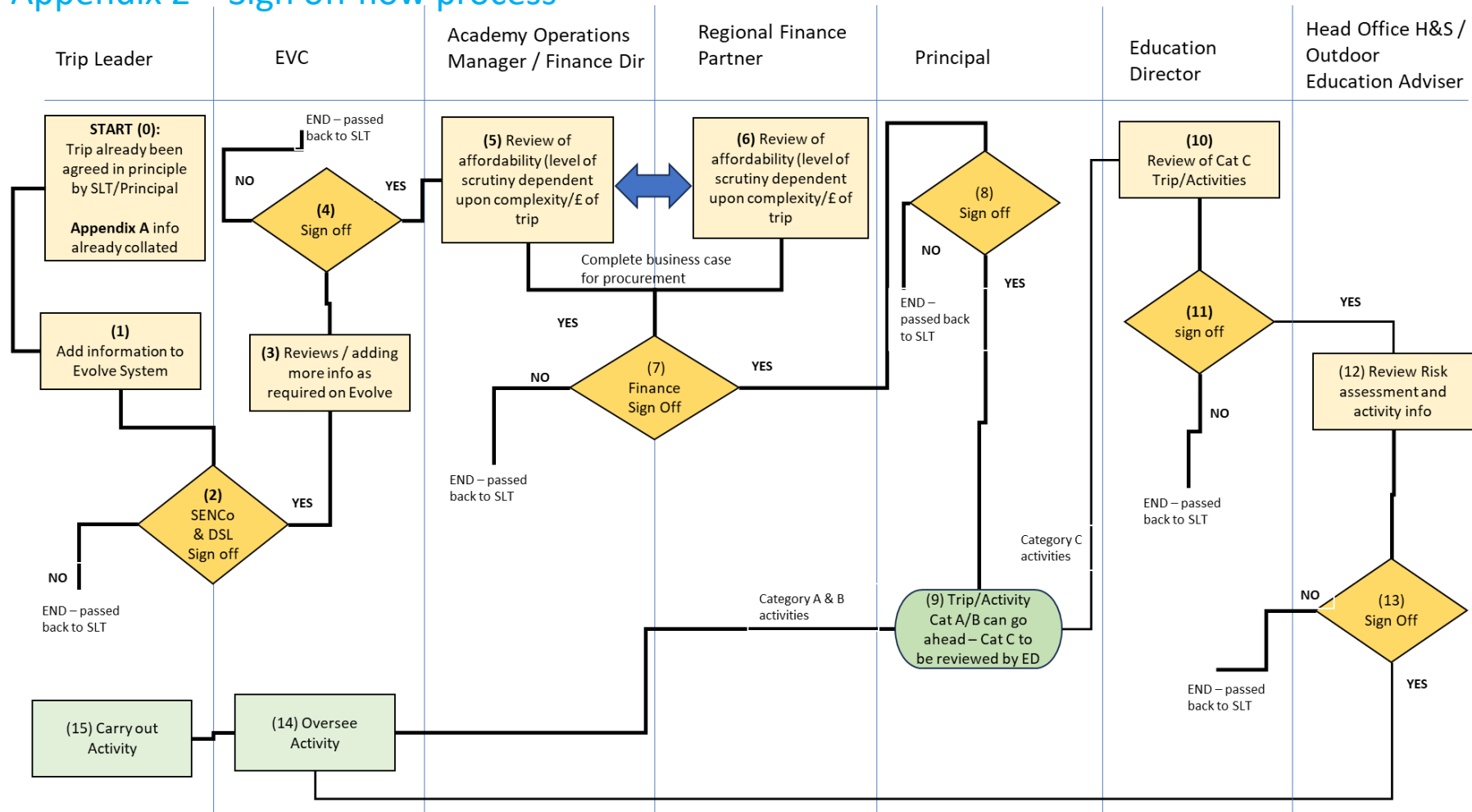
- Be prepared that plans may change and that you will need to alter itinerary or the management of children
- Make sure any major changes are reported to your home contact in case parents need to be made aware
- PMLR provide 24/7 crisis hotline so in the event you require additional support please contact them
- When you get back make sure you feedback any information on any providers or process

Trip proposal check list

Information	Leader to Complete	SLT Approval/discussion
Trip Leader		
Educational purpose of the activity/trip – how will it benefit children?		
Nature of trip activity	e.g. Local, Residential, International, High-Risk Activity, Sporting	
Trip Dates / Timings		
Trip Location		
Visa / insurance requirements		
3 rd party venue / Providers		
Student year / subject		
Number of children (Male/Female)		
Staff numbers (Male/Female)		
Staff experience		
Any known hazards		
Cover requirements		
Transport (minibus, coach etc.)		
Costs (funded/ cost to be met by pupil)		
Other information		

*To note: It is the trip organisers responsibilities to get **quotes** for any tickets and transport.*

Appendix 2 – Sign off flow process



Appendix 3 – Visit plan and risk assessment template v.1

Author: Mike Tibbits (Outdoor Education Adviser)

Date: 04/03/2024

Part 1: Summary of the planned educational visit

Title of planned educational visit	
Name of destination(s)	
Learning objective(s)	
Start date	
End date	
Overnight residential visit	YES / NO
Adventurous activities visit <i>[includes all DofE expedition activities]</i>	YES / NO
Overseas visit	YES / NO
Insurance policy details	
Visit Leader name	
Mobile telephone number	
Deputy Visit Leader name	
Mobile telephone number	
SLT 24hr Emergency Home Contact name & role	
SLT 24hr Emergency Home Contact telephone number(s)	
Have you confirmed with this person they are able to fulfil the role of Emergency Home Contact for the duration of the visit?	YES / NO

Part 2: STAGER variables

Complete this section in as much detail as possible

STAGER Variables – Staff, Timings, Activities, Group, Environment & Remoteness													
Staff	<p>How many staff are involved: Employees = Volunteers =</p> <p>Volunteer declaration: I confirm that the volunteers are registered with the academy and have completed the required safeguarding training in line with OAT policy. YES / NO</p> <p>Volunteers may need vetting checks as per KCSIE. They also will need to be added to the SCR.</p> <p>Who are the staff and what qualifications & experience do they have:</p> <table border="1"> <thead> <tr> <th>Staff name</th> <th>Qualifications & experience</th> </tr> </thead> <tbody> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> </tbody> </table> <p><i>[Add additional rows or delete as required]</i></p>	Staff name	Qualifications & experience										
Staff name	Qualifications & experience												
Timings	<p>Start date and time =</p> <p>End date and time =</p>												
Activities	<p>Where are the planned activities for this educational visit taking place?</p> <p>What are the planned activities for this educational visit?</p> <p>Who is running the planned activities for this educational visit? <i>[Note, if this is an external provider, has an OAT Provider form been completed and submitted?]</i></p> <p>What are the travel arrangements for this educational visit? <i>[Note, if this is an external provider, has an OAT Provider form been completed and submitted?]</i></p> <p>Who and how will the students be supervised? (Note, if there are points during the visit where students will be remotely supervised provided measures to mitigate any risk)</p>												

Group	<p>Who are the children participating?</p> <p>What is the gender split? M = F =</p> <p>What medical conditions do staff and children have to include any allergies or dietary requirements and what arrangements are in place?</p> <p>What arrangements are in place on the visit for children who are SEND?</p> <p>Has the academy DSL and SENCO will have been consulted and supportive of the visit?</p> <p>What arrangements are in place on the visit for children who receive FSM?</p>
Environment	<p>What environments are there to consider when identifying risks for this educational visit? <i>[Note this is not a complete list but consider environments during outwards travel, all planned activities, activity-free time, overnights & return travel.]</i></p> <ol style="list-style-type: none"> 1. 2. 3. 4. <p><i>[Add additional rows or delete as required]</i></p> <p>What is planned to reduce risks for each environment identified?</p> <ol style="list-style-type: none"> 1. 2. 3. 4. <p><i>[Add additional rows or delete as required]</i></p>
Remoteness	<p>How remote will the staff and participants be during the educational visit? <i>[E.g., urban area, countryside, coastal areas, upland areas, mountainous areas.]</i></p> <p>Are any special arrangements required in case of an emergency? <i>[Consider how long it would take for help to arrive in an emergency.]</i></p>

Part 3: Detailed visit plan

All parts of the day should be planned for, including allocated 'free' time where children may be remotely supervised (e.g., out at a venue, in accommodation or on transport)

Day	Date	Time from	Time until	Full details of planned activity [Include addresses where possible (e.g., for venues, planned motorway service station stops, accommodation etc.)]

[Add additional rows or delete as required]

Part 4: Event specific risk assessment

If any residual risk rating remains 'High' after control measures are put in place, consider if this activity should be permitted to go ahead without additional mitigation.

Specific Activity - Hazards and identification of risk: Those hazards and associated risks which may result in serious harm.	Those who might be harmed: The persons who are at risk from the significant hazards identified	Control Measures: Detail the control measures to be implemented, including references to any relevant sources of guidance. Recommended National Guidance: Outdoor Education Advisers' Panel (OEAP) www.oeap.info Measures should state exactly how the hazard and its associated risks will be mitigated to keep individuals safe.	likelihood of the risk occurring H/M/L	potential impact of the risk occurring H/M/L
Individual children have different risks - where would they be assessed?	E.g. a partially sighted or autistic child or a child whose safeguarding risks are high			
Transport – risk of injury or death				
Roads & crossing traffic – risk of injury or death				
Food – risk of allergic reactions and/or death				
Weather – risk of injury or death				
Remote supervision – risk of injury or death				

Medical conditions – risk of illness or death				
Being separated from small group or visit party – risk of injury or death				

[Add additional rows or delete as required]

Annex 1 - Organising a Visit/ Trip Procedures 2023-2024

Please follow this procedure in order when planning / preparing for and carrying out an educational visit or trip:

1. All off-site visits need to be added to Evolve for approval-this includes local visits and fixtures.
2. Please familiarise yourself prior to planning your visit/ trip with the following documents which can be found on the desktop:
 - Visit Leader Checklist
 - All Visits Planning and Monitoring Checklist
 - Management of Off-Site Visits and Related Activities Policy
3. Inform your Line Manager and DF the Educational Visits Co-ordinator (EVC) if you wish to carry out a trip or visit.
4. Prepare costings for the trip and budget, considering any subsidy if applicable and complete in detail the 'Trip Checklist' Proposal form for discussion and approval by SLT (You may be invited to SLT to discuss further if required).
 - a. Check the whole school calendar with CHD.
 - b. Liaise with the JMO for cover requirements!
 - c. Liaise with CB SENDCO for availability of support staff if required!
 - d. Liaise with School Finance, with all costings accounted for to ensure the trip is viable to run.
 - If your trip/ visit is over £5000 you will be expected to get 3 like for like quotes
 - If it is over £10,000 a business case will have to be submitted to regional finance for approval.
 - **Please ensure you consider all costings for the trip at this stage.**
 - e. Oversees and those involving more complex arrangement must be planned and discussed well in advance, 12 months prior to departure dates.
5. If approved complete first of stage 'EVOLVE' Outline Approval from EVC-4:

- The visit leader needs to create a Visit Form in Evolve and submit it for Outline Approval, based on a few key sections of the visit form. DF will be sent an email notification to alert them to the visit form, and he will be asked to grant or decline outline approval. If they decline, they will add a note and the visit form is returned to the staff member. If Outline Approval is granted, the visit form will be returned to the staff member ready for completion of the additional sections of the visit form.
6. Outline Approval Granted-Provisionally book the trip/ visit, liaise with Chris Flatley regarding booking of mini-buses if required or Lisa Crocker if a coach is required.
 7. Begin completing 'EVOLVE' with all the necessary documents.
 8. Prepare a letter including a visit consent slip for students / parents / carers which must be checked by a member of SLT and go through the admin team to format onto letter headed paper.
 9. See Tracey Cresswell to setup the trip/ visit on School Coms to allow parents/ carers to make payments if applicable.
 10. Send letter home including details of how to pay if applicable.
 11. Collect student responses with any monies.
 12. Ensure monies collected are recorded and handed into the Finance team.
 13. Confirm booking of event and transport after receiving consent slips and money.
 14. Complete EVOLVE and submit within the appropriate deadlines as indicated below.
 15. Ensure Every is completed by agreed staff accompanying the Visit/Trip.
 16. Inform DF of any changes after completion of EVOLVE.
 17. Final authorisation by the Principal before submission to OAT
 18. Complete evaluations and update register of attendance where applicable in EVOLVE.

PLEASE NOTE:

1. EVOLVE COMPLETION FOR ADEVENTUROUS ACTIVITIES, RESIDENTIALS AND OVERSEES (CATERGORY C) VISITS MUST BE COMPLETED AT LEAST **6 WEEKS PRIOR TO TRAVEL** AS THIS NEEDS TO BE APPROVED BY THE PRINCIPAL, OUR EDUCATIONAL REGIONAL DIRECTOR AND OAT.
2. ALL OTHER TRIPS/ VISITS (CATERGORY A & B) VISITS **3 WEEKS PRIOR TO THE VISIT DATE.**
3. YOUR VISIT/ TRIP WILL BE CANCELLED IF THESE PROCEDURES ARE NOT FOLLOWED AND DEADLINES ARE NOT MET. THE TRIP/ VISIT LEAD WILL HAVE TO INFORM STUDENTS AND PARENTS ACCORDINGLY.